

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

<b>Transaction Number</b>	<b>Transaction Date</b>	<b>Provider Name</b>	<b>Course Name</b>	<b>Course Group</b>	<b>Credits</b>	<b>Course Summary</b>
2897760846	4/12/2019	DF Institute, dba Kaplan Financial	Property-Casualty Concepts, 13th Edition	Property & Casualty	General: 12	The course addresses product knowledge of property and casualty insurance. Discusses insurance principles and contracts, insurance company, regulation, the insurance transaction, property and liability insurance, dwelling, homeowners and personal auto insurance, commercial package policy, ocean and marine insurance, commercial general liability, auto and crime insurance, workers' compensation and miscellaneous coverage.
4092005287	4/15/2019	CGB Diversified Services Inc	DCIS Fundamentals I	Property & Casualty	General: 6	NAIC Uniform submission, 6 classroom credit hours approved by Illinois. Discusses crop insurance basics, mapping and unit structure, precision agriculture, livestock and dairy revenue, the federal Risk Management Agency, and federal compliance requirements.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

4092005287	4/15/2019	CGB Diversified Services Inc	DCIS Fundamentals II	Property & Casualty	General: 6	NAIC Uniform submission, 6 classroom credit hours approved by Illinois. Discusses the crop insurance application and deadlines, actual production history, acreage reports, yield, claims, and billing of premium.
3893791083	4/16/2019	Broker Educational Sales and Training, Inc	Managing Retirement Income I	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses the retirement market, retirement income need assessment, retirement income risk factors, annuities, qualified longevity annuity contracts, and health costs in retirement.
142378114	4/17/2019	Mountain West Farm Bureau Mutual Insurance Company	Livestock and Farmers Markets	Property & Casualty	General: 1	The course addresses property and casualty insurance. Discusses perils and limitations for livestock coverage, farmer's market coverage, country squire policies, and incidental business endorsement. Offerings prior to 5/2/19 are not eligible for credit.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

230749633	4/17/2019	NAU Country Insurance Company	2020 Fall MPCU Update - 6	Property & Casualty	General: 6	NAIC Uniform submission, 6 classroom credit hours approved by Minnesota. Discusses program changes for the 2020 crop year, federal application submission deadlines, actual production history, acreage reporting, unit mapping, actuarial changes, multi-peril crop insurance forms, claims and compliance and region specific plans, crops and programs.
836696833	4/17/2019	NAU Country Insurance Company	2020 Fall MPCU Update - 4	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Minnesota. Discusses program changes for the 2020 crop year, federal application submission deadlines, actual production history, acreage reporting, unit mapping, actuarial changes, multi-peril crop insurance forms, claims and compliance and region specific plans, crops and programs.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

3105187887	4/17/2019	Mountain West Farm Bureau Mutual Insurance Company	Cargo and Country Home Farm Personal Property	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses the country home policy, farm personal property coverage, increasing farm personal property limits, farm structure coverage, cargo coverage, unscheduled cargo endorsement and determining primary coverage. Offerings prior to 5/2/19 not eligible for insurance continuing education credit.
2030558243	4/18/2019	Nationwide Life Insurance Company	The Concept of Reasonable Compensation	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Ohio. Discusses ERISA-prohibited transactions and exemptions, investment advice fiduciary, reasonableness of compensation and analysis of two law cases.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

2542747384	4/18/2019	Hall & Evans, LLC	Cradle to Grave of Litigation Management: The Cradle	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Colorado. Discusses litigation of insurance issues, analysis of policy and policy status, defendant role in a suit, impressions of the case, investigation and settlement determination.
125722402	4/19/2019	Transamerica Occidental Life Insurance	Business Succession Planning	Life	General: 1	The course addresses product knowledge of life insurance. Discusses types and characteristics of businesses, buy-sell agreements, business valuation, IRS guidelines and one case study.
1551271133	4/22/2019	Nationwide Life Insurance Company	Limitations on Contributions, Benefits, and Deductions for Various Types of Retirement Plans	Life	General: 1	The course addresses product knowledge of life insurance. Discusses types of IRAs and pensions, funding and payout methods, taxation and plan eligibility.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

3380460692	4/22/2019	CEU Institute, Inc.	Back and Neck Injuries_Return To Work (1hr)	Adjuster	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses independent medical examination (IME) goals, diagnosis and risk, injury types, and return-to-work.
597742095	4/23/2019	National Association of Public Insurance Adjusters	2019 NAPIA Annual Meeting	Adjuster	General: 7	NAIC Uniform submission, 7 classroom credit hours approved by Virginia. Discusses assignment of benefits, unauthorized practice of public adjusting, exceptions to exclusions, meteorology and adjusting, wind deductible, local building officials, and five case studies.
2284982082	4/23/2019	Raymond James Insurance Group, Inc. (formerly Planning Corporation of America)	2019 SD HENRY	Life	General: 1	The course addresses product knowledge of life insurance. Discusses high earner, not rich yet investors, retirement savings goals, and one case study.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

2337537681	4/23/2019	Old Republic National Title Insurance Company - Rocky Mountain	SSU - Blockchain and Title Insurance	Title	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Utah. Discusses use of cryptocurrency in real estate transactions, benefits and barriers of blockchain technology, recordkeeping, transactions and financial regulation.
2753629466	4/23/2019	National Alliance for Insurance Education and Research	2019 Ruble Graduate Seminar-PC XIX	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses additional insureds, executive risk coverage, workers' compensation, cyber risk exposures, commercial property insurance and business auto coverage.
913930045	4/24/2019	National Alliance for Insurance Education and Research	Large Commercial Course (Webinar)	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses large account property and casualty issues, contracts and risk transfer, the Occupational Safety and Health Administration and workplace injuries.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

913930045	4/24/2019	National Alliance for Insurance Education and Research	Large Commercial Course (Classroom)	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses large account property and casualty issues, contracts and risk transfer, the Occupational Safety and Health Administration and workplace injuries.
1026074015	4/24/2019	Producers AG Insurance Company, dba PROAG	2020 Rainfall Index Training Webinar	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses the federal rainfall index, pasture, rangeland and forage coverage, acreage reporting, underwriting, and variation with agriculture coverage.



Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

3349985716	4/24/2019	CLM Group, Inc., dba Claims & Litigation Management Alliance	2019 CLM Cyber Management & Professional Liability Conference	Adjuster	General: 7	The course addresses product knowledge of property and casualty insurance and management. Discusses insolvency issues, catastrophe liability issues, cyber insurance coverage, sexual harassment litigation, directors and officers coverage, cryptocurrency liability, electronic action bad faith, disability and medical marijuana, data breach, employment exposures, design-build projects, biometric information abuse and unauthorized law practice.
1172309143	4/25/2019	Prudential Annuities Life Assurance Corporation	Disruption - A New Technology Frontier	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses market trends, technologies affecting changes, e-commerce, determining the effect of the changes, vehicle-related shared and autonomous services.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

3757202593	4/25/2019	ArmTech Insurance Services Inc.	2020 Fall Agent Update	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses crop insurance handbook, RMA regulation, and policy changes, actuarial updates, underwriting, and claims.
755800287	4/26/2019	Burns & Wilcox	Equipment Breakdown and Business Interruption Insurance- Webinar	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses equipment breakdown and business interruption coverage, types of business interruption and seven equipment breakdown case studies.
934702435	4/26/2019	Quest Continuing Education Solutions	Dental Benefits Today	Life	General: 2	The course addresses product knowledge of disability insurance. Discusses changes in dental benefits, preferred provider organizations, wellness and dental care, dental plan design, contract and network design.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

3836527895	4/26/2019	First American Title Insurance Company	Quarterly Roundup - Bankruptcy	Title	General: 1	The course addresses product knowledge of title insurance. Discusses the effect of bankruptcy on residential real estate, types of bankruptcy, exempt property, abandonment, liens, title policy endorsements, and underwriting Chapter 7 and 13 bankruptcies.
1512499748	4/29/2019	Burns & Wilcox	The Basic Laws of CGL Coverage- Webinar	Property & Casualty	General: 1	The course addresses property and casualty insurance. Discusses commercial general liability coverage laws, coverages, coverage gaps, tort and contract law, certificates of insurance, additional insureds, and four case studies.
2650254341	4/29/2019	Honkamp Krueger Financial Services, Inc.	2019 HK Financial Services Conference Day 3 - Ethics	Ethics	Ethics: 1	The course addresses ethics. Discusses public practice CPA ethical concepts, conflicts of interest and disclosure, AICPA definition for attest and non-attest clients, the AICPA code of ethics, and continuing education requirements.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

2650254341	4/29/2019	Honkamp Krueger Financial Services, Inc.	2019 HK Financial Services Conference - Day 3	Life	<p><b>General:</b> <b>5</b></p> <p>The course addresses product knowledge of life insurance and annuities. Discusses underwriting life insurance for prospective insureds, uses for life insurance, buy-sell for business owners, behavioral finance, market effect on annuities and life insurance, and fiduciary duty, policies, cybersecurity and 1 hour of personnel management/psychology. Recommend approval for 4 credit hours of insurance continuing education.</p>
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Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

2650254341	4/29/2019	Honkamp Krueger Financial Services, Inc.	2019 HK Financial Services Conference Day 2	Life	General: 8	The course addresses product knowledge of life insurance and annuities. Discusses retirement plan services, wealth management, the effect of politics on the marketplace and 4 hours of non-insurance personnel management. Recommend approval for 4 credit hours of insurance continuing education.
3861126215	4/29/2019	Hudson Insurance Company	Acreage Report Training - 2019 and Succeeding Years	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Kansas. Discusses acreage reporting, types of acreage, report revisions, and acceptable acreage reports.
1290414617	4/30/2019	Guardian Life Insurance Company of America	State Mandated DI Paid Family Leave Plans	Disability (Health)	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by New York. Discusses New York, New Jersey, California, Hawaii and Rhode Island mandated disability benefits, eligibility, features, costs, employee protections and paid family leave.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

2643636942	4/30/2019	Securian Financial Group, Inc.	Social Security: Advanced Case Studies & Government Pensions	Life	General: 1	The course addresses product knowledge of life insurance. Discusses retirement income planning, Social Security program changes, file and suspend elimination, the windfall elimination provision, and government pension offset provision.
3234822326	4/30/2019	Lloyd's America	Understanding E&S and the Lloyd's of London Markets	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses the excess and surplus lines market, insurance risks, underwriting, claims handling and emerging risks.
3630356146	4/30/2019	National Alliance for Insurance Education and Research	2019 MEGA Seminar II	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses liquor liability exposures and coverages, healthcare costs in retirement, funding retirement, coverage and liability, workplace injuries, personal auto coverage, and waterfront risk exposures.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

2184517316	5/1/2019	National Alliance for Insurance Education and Research	When Disaster Strikes...Lessons Learned From the Front Lines (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses a comparison of hurricane impact 2016-2018, types of claims, catastrophic flooding, policy endorsements, disaster recovery efforts and disaster plan update.
3221780332	5/1/2019	National Alliance for Insurance Education and Research	When Disaster Strikes...Lessons Learned From the Front Lines (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses a comparison of hurricane impact 2016-2018, types of claims, catastrophic flooding, policy endorsements, disaster recovery efforts and disaster plan update.
30035292	5/2/2019	National Alliance for Insurance Education and Research	2019 Ruble Graduate Seminar-PC XXI	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses professional liability insurance, cyber- exposures, commercial lines coverage, and procedural mistake consequences.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

546579484	5/2/2019	Lincoln National Life Insurance Company/Connecticut	Annuity as an Asset Class	Life	General: 1	The course addresses product knowledge of annuities. Discusses annuity growth products, income annuities, legacy planning, pros and cons of life insurance and annuities.
1842049286	5/2/2019	DF Institute, dba Kaplan Financial	Property & Casualty Principles 5th Edition	Property & Casualty	General: 5	NAIC Uniform submission, 5 computer-based, self study credit hours approved by Illinois. Discusses insurance benefits and concepts, the insurance industry, insurance contracts, property and casualty policies, commercial lines, and the complexities of insurance.
1921898616	5/2/2019	Bison Mountain Financial	2019 Montana Insurance Law Update	MT Legislative Changes	MT Legislative Changes: 1	The course addresses legislative changes to Montana insurance statutes. Discusses House bills 62, 64, 66, 85, 91, 92, 373, 382, and Senate bills 39 and 83.
1973903743	5/2/2019	DF Institute, dba Kaplan Financial	Residential Construction Basics, 4th Edition	Adjuster	General: 6	NAIC Uniform submission 6 computer-based, self study credit hours approved by Illinois. Discusses evaluation and pricing of foundations, flooring, framing, roofing, utilities, insulation and estimating losses and repairs.



Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

2609855942	5/2/2019	National Alliance for Insurance Education and Research	Advanced Continuing Education Series – 16AC II	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses carve outs, ancillary insurance products, financing and funding insurance, insuring boats, ATVs and other toys, and personal umbrella and excess liability insurance.
3560478416	5/2/2019	Marsh USA, Inc.	Advanced Environmental Risk Management, 3rd Edition	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses environmental risks, environmental liability buy-out, responsible party risk, environmental representations and warranties, and claims management.
150005927	5/3/2019	Montana Insurance Education Foundation, Inc.	2019 Legislative Changes to Montana Insurance Statutes	MT Legislative Changes	MT Legislative Changes: 1	The course addresses legislative changes to Montana insurance statutes and other related statutes. Discusses House bills, 62, 64, 92, 370 (notary laws), 373, 382, 416, 515 (motor vehicle laws), 578, 757 and Senate bills 39, 83, and 125.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

3548455203	5/3/2019	Nationwide Life Insurance Company	Life Insurance Income Tax Traps (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance. Discusses taxation of life insurance premiums and death benefits, tax consequences of living benefits, and reportable policy sales.
4244161856	5/3/2019	Nationwide Life Insurance Company	Life Insurance Income Tax Traps	Life	General: 1	The course addresses product knowledge of life insurance. Discusses taxation of life insurance premiums and death benefits, tax consequences of living benefits, and reportable policy sales.
802282719	5/6/2019	National Alliance for Insurance Education and Research	The Insurance Solutions for Protecting Your Wealth from Healthcare Costs in Retirement (Class)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses healthcare costs in retirement, Medicare eligibility, Parts A, B, C and D, coverage, long-term care insurance, policy provisions, underwriting issues, and policy alternatives.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

1785211440	5/6/2019	National Alliance for Insurance Education and Research	The Insurance Solutions for Protecting Your Wealth from Healthcare Costs in Retirement (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses healthcare costs in retirement, Medicare eligibility, Parts A, B, C and D, coverage, long-term care insurance, policy provisions, underwriting issues, and policy alternatives.
2815294994	5/6/2019	Group Benefits Division of Hartford Life Insurance Company	Overall Well-Being	Life	General: 2	The course addresses product knowledge of life and disability insurance. Discusses employer- sponsored wellness programs, financial and health statistics, the cost of illness to employers, Federal statutes with wellness components, employee assistance plans and encouraging employee participation.
1290741870	5/7/2019	National Alliance for Insurance Education and Research	Insurance for EPL, Cyber, and Professionals Liability Exposures (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses employment practices liability insurance, cyber and professional liability, and technology errors and omissions.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

1808009494	5/7/2019	Prudential Annuities Life Assurance Corporation	Managing 8 Risks to Retirement Income: Benefits of Using Life Insurance in Retirement Income Plans	Life	General: 1	The course addresses product knowledge of life insurance. Discusses retirement income plan risks, healthcare costs, taxation of retirement income, and life insurance in retirement planning.
1963991335	5/7/2019	National Alliance for Insurance Education and Research	Insurance for EPL, Cyber, and Professionals Liability Exposures (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses employment practices liability insurance, cyber and professional liability, and technology errors and omissions.
2027620815	5/7/2019	National Association of Health Underwriters	Advanced Benefit Account Manager Certification	Disability (Health)	General: 9	NAIC Uniform submission, 9 computer-based, self study credit hours approved by Illinois. Discusses benefit account manager certification program, working with carriers and clients, ERISA, COBRA, benefit administration, taxation of benefits, benefit cafeteria plans, claims, and benefit technology.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

2027620815	5/7/2019	National Association of Health Underwriters	NAHU Principles in Ethics	Ethics	Ethics: 3	NAIC Uniform submission, 3 classroom credit hours approved by Illinois. Discusses ethics scenarios, cultural norms, ethical issues for the insurance professional, industry rules, privacy, codes of ethics, and regulation development and implementation.
722005467	5/8/2019	American Online Insurance School, dba of Florida School of Insurance	Medicare Fraud	Life	General: 11	NAIC Uniform submission, 11 computer-based, self study credit hours approved by Florida. Discusses Medicare abuse, prosecutions, false claims act, whistleblower lawsuits, intentional miscoding, fraud in pharmaceuticals and durable medical equipment, kickbacks and bribes, fraudulent claim denials, money laundering and conviction sentences.
3681440539	5/8/2019	American Online Insurance School, dba of Florida School of Insurance	Financial Challenges/Changing Markets	Life	General: 10	NAIC Uniform submission, 10 computer-based, self study credit hours approved by Florida. Discusses individual life and disability insurance, policies and underwriting, due diligence, disclosure and licensee ethics.

Montana Insurance Continuing Education Advisory Council meeting - May 15, 2019

3911687028	5/9/2019	Land Title Institute	2019 ALTA Commercial Network	Title	General: 8	The course addresses product knowledge of title insurance. Discusses land surveys, eight legal cases, economic trends affecting the title insurance industry, alternative financing, regional title insurance differences, forms and endorsements.
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**Individual Course submission**

4/29/2019	Debra Daniels	Advancements in Prosthetics, CEU Institute	Disability and Casualty	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses advancements in prosthetics and injury rehabilitation, replacement of missing body parts, increases in functionality, and integration of computer-assisted functions.
5/2/2019	Heather Myre, Terrilee Stoltz	Cargo and Country Home Farm Personal Property, Mountain West Farm Bureau Mutual Insurance Company	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses the country home policy, farm personal property coverage, increasing farm personal property limits, farm structure coverage, cargo coverage, unscheduled cargo endorsement and determining primary coverage. 3/29/19 course offering.